



Intake Fees

- \$500: Health Care Representative and/or Financial Power of Attorney
- \$250: Trustee or Personal Representative

Hourly Professional Fees

- \$150/hour: Active Health Care and Financial Services and Health Care Consulting
- \$300/hour: High level decisions with client's attorneys, the court system, and personal businesses; consulting on behalf of clients with other professionals such as financial advisors and CPAs, drafting Client Service Plans, etc.

Monthly Administrative Fees

(In addition to hourly fees)

- \$150/month: Active Health Care or Guardian of the Person
- Power of Attorney or Guardian of the estate:
 - \$250: Four or fewer accounts to manage.
 - \$350: Five to eight accounts to manage.
 - \$450: Nine or more accounts to manage.

Mileage: IRS Standard Mileage Rate

- Charged when traveling for a client errand or when client is outside of a 15 mile radius of our offices.

Tax Return Coordination

- \$300: Coordinate yearly tax return with CPA.

Standby Fee

- \$150: Check-in with clients who are not active (every 1-3 years).